



ESC: OCFO Change Proposal (OCP) GSS Quick Start

Version	Date	Author	Change Description
1.0	09/26/2007	Siraj Konkader	Created from OCFO 1.0 User Manual
1.1	11/5/2007	Siraj Konkader	Show default actors for each OCP state change
1.2	3/30/2008	Siraj Konkader	OCFO Reorganization related changes
1.3	10/07/2009	Siraj Konkader	Updated for integrator role

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Contacting support

Please send email to esc-support@gsa.gov

Overview of ClearQuest

ClearQuest is a workflow based software package from IBM Rational's Configuration Management Suite that allows users to define their organization's change process using an Activity Based model. In this model a change process is broken down into discrete steps with each step having a unique state. State transitions occur as users execute actions.

Connecting

URL: <http://esc.finance.gsa.gov/cqweb/login>

User Name & Password: ENT account credentials (First name + middle initial + last name).

Schema Repository: Production

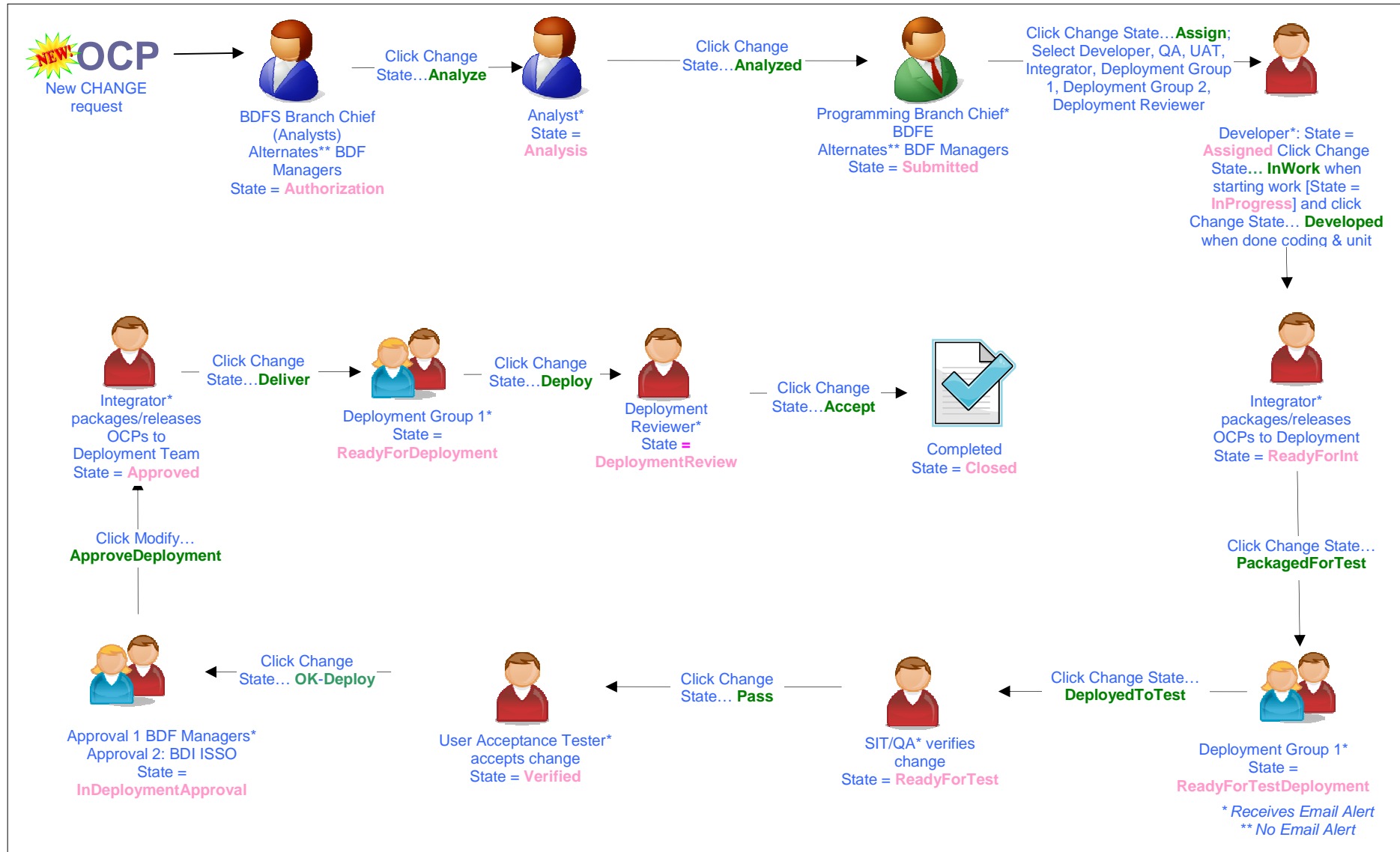
Database: ESC01



The screenshot shows a login window titled "Please enter your User Name and Password." On the left is a large blue square with the white "GSA" logo. On the right, there are four input fields: "User Name:" with the text "SirajKonkader", "Password:" (empty), "Schema Repository:" with a dropdown menu showing "Production", and "Database:" with a dropdown menu showing "ESC01 : Production Database ...". A "Login" button is located at the bottom right of the form area.

OCP Workflow

The workflow diagram below shows the interaction between roles and actions in the full lifecycle of a Change proposal.



OCP Actions

Source State	Default Role	Action	Destination State	Note
Draft	Submitter	Process	Submitted	OCP is sent to BDFS Branch Chief
		Close	Closed	OCP is closed
Authorization	Analysis Lead - BDFS Branch Chief (Owner on Subsystem table)	Authorize	Submitted	OCP is sent to Manager
		Open	Opened	OCP is sent to CCB
		Return	Draft	OCP is sent to submitter
		Analyze	Analysis	OCP is sent to Analyst
		Assign	Assigned	OCP is sent to Developer
		Close	Closed	OCP is closed
		Defer	Deferred	OCP is deferred
Submitted	Program Lead	Return	Draft	OCP is returned to submitter
		Get Authorization	Authorization	OCP is sent to Analysis Lead
		Analyze	Analysis	OCP is sent to Analyst
		Open	Opened	OCP is sent to CCB
		Security Review	Security Analysis	OCP is sent to ISSO
		Assign	Assigned	OCP is sent to developer
		Admin To Ready For Test Deploy	Ready For Test Deployment	OCP is sent to deployment team #1
		Send to Next Deployment Test	Ready For Test Deployment 2	OCP is sent to deployment team #2
		Admin To Ready For Test	Ready For Test	OCP is sent to QA
		Admin To Verified	Verified	OCP is sent to UAT
		OK-Deploy	In Deployment Approval	OCP is sent for deployment approval
		Admin To Approved	Approved	OCP is sent to integrator. If no integrator, OCP is sent to deployment team
		Deliver	Ready For Deployment	OCP is sent to deployment team

Source State	Default Role	Action	Destination State	Note
				#1
		Send To Next Deployment	Ready For Deployment 2	OCP is sent to deployment team #2
		Close	Closed	OCP is closed
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
Analysis	Analyst	Analyzed	Submitted	Analyst sends OCP to Manager
		Get Authorization	Authorization	OCP is sent to Analysis Lead
		Close	Closed	OCP is closed
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
Opened	CCB	CCB Approve	Submitted	CCB sends approved OCP to Manager
		Return	Draft	OCP is sent to submitter
		Analyze	Analysis	OCP is sent to Analyst
		Security Review	Security Analysis	OCP is sent to ISSO
		Assign	Assigned	OCP is sent to developer
		Close	Closed	OCP is closed
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
Security Analysis	ISSO	Security Reviewed	Submitted	ISSO returns OCP to manager
		Close	Closed	OCP is closed
		Defer	Deferred	OCP is put on hold
Assigned	Developer	In Work	In Progress	Developer begins work
		Admin To Submitted	Submitted	OCP returned to manager
		Ready For Int	Ready For Int	OCP is sent to Integrator for Test packaging

Source State	Default Role	Action	Destination State	Note
		Admin To Ready For Test	Ready For Test	OCP is sent to QA/SIT
		Admin To Verified	Verified	OCP is sent to UAT
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
In Progress	Developer	Developed	Ready for Integrator	OCP is sent to Integrator or if no integrator specified OCP is sent to deployment team #1
		Admin To Submitted	Submitted	OCP returned to manager
		System Test Ready	Ready for Test	OCP is ready for testing - no deployment to test is required. Occurs if development and test region are same or if developer deploys to test
		OK-Deploy	In Deployment Approval	Developer sends OCP for deployment to production bypassing test region and testing
		Review	Deployment Review	Developer sends OCP for final review. Used when updating manuals, training material etc.
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
Ready For Integrator	Integrator / Implementation Manager	Disapprove	Submitted	Integrator rejects OCP - sent to Manager
		Return To Dev	Assigned	OCP is returned to Developer
		Admin To In Progress	In Progress	OCP is returned to Developer - In progress state
		Packaged For Test	Ready For Test Deployment	OCP is sent to deployment team

Source State	Default Role	Action	Destination State	Note
				for install to Test environment
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
Ready For Test Deployment	Deployment Group / Implementation Technician	Disapprove	Submitted	Deployment group rejects OCP to Manager
		Return To Dev	Assigned	Deployment group returns OCP to developer
		Send to Next Deployment Test	Ready For Test Deployment 2	OCP is sent to deployment team #2
		Deployed to Test	Ready for Test	Deployment group deploys changes to test - OCP is sent to QA
		Deployed To UAT	Verified	Deployment group deploys changes to UAT - OCP is sent to UAT (QA role is bypassed)
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
Ready For Test Deployment 2	Deployment Group 2 / Implementation Technician 2	Disapprove	Submitted	Deployment group rejects OCP to Manager
		Return To Dev	Assigned	Deployment group returns OCP to developer
		Deployed to Test	Ready for Test	Deployment group deploys changes to test - OCP is sent to QA
		Deployed To UAT	Verified	Deployment group deploys changes to UAT - OCP is sent to

Source State	Default Role	Action	Destination State	Note
				UAT (QA role is bypassed)
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
Ready For Test	QA	Fail	Submitted	QA tester sends OCP to Manager (Lead)
		Pass	Verified	QA tester sends OCP to UAT
		Assign	Assigned	Sent to Developer
		Ready For Int	Ready For Int	Sent to Integrator (Test phase)
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
Verified	UAT	Disapprove	Submitted	UAT rejects OCP to Manager
		OK-Deploy	In Deployment Approval	UAT accepts OCP
		Admin To Ready For Test	Ready For Test	OCP sent to QA/SIT
		Close	Closed	UAT closes OCP - no change is deployed
		Defer	Deferred	OCP is put on hold
In Deployment Approval	Varies by system - see Approval Setup record for system	Approve Deployment	Approved	Multiple approval steps may exist. Only final approval will move OCP to "Approved" state.
Approved	Integrator / Implementation Manager	Deliver	Ready For Deployment	Integrator sends OCP to Deployment Team
		Disapprove	Submitted	OCP is sent to Manager (Lead)
		Admin To Verified	Verified	OCP is sent to UAT
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold

Source State	Default Role	Action	Destination State	Note
		Close	Closed	OCP is closed
Ready For Deployment	Deployment Group / Implementation Technician	Disapprove	Submitted	Deployment group rejects OCP to Manager
		Return To Dev	Assigned	Deployment group returns OCP to developer
		Send to Next Deployment Test	Ready For Deployment 2	OCP is sent to deployment team #2
		Deploy	Deployment Review	Deployment group deploys changes to production - OCP is sent to Deployment Reviewer
		Admin To Approved	Approved	Sent to Integrator
		Duplicate	Duplicate	OCP is suspended as a duplicate of another
		Defer	Deferred	OCP is put on hold
		Close	Closed	OCP is closed
Ready For Deployment2	Deployment Group 2 / Implementation Technician 2	Disapprove	Submitted	Deployment group rejects OCP to Manager
		Return To Dev	Assigned	Deployment group returns OCP to developer
		Deploy	Deployment Review	Deployment group deploys changes to production - OCP is sent to Deployment Reviewer
		Admin To Ready For Deployment	Ready For Deployment	OCP is sent to deployment team
		Close	Closed	OCP is closed
Deployment Review	Deployment Reviewer	Disapprove	Submitted	OCP is rejected & sent to Manager

Source State	Default Role	Action	Destination State	Note
		Reject	Deployed	OCP is sent back to QA (sys. Tester) for review
		Accept	Closed	OCP is accepted and closed
		Admin To Ready For Deployment	Ready For Deployment	OCP is sent to deployment team
		Admin To Ready For Deployment 2	Ready For Deployment 2	OCP is sent to 2 nd deployment team
Deployed	UAT	Disapprove	Submitted	OCP is sent to Manager(Lead)
		Review	Deployment Review	QA (system tester) sends OCP back to Deployment Reviewer
		Admin To Ready For Deployment	Ready For Deployment	OCP is sent to deployment team
		Admin To Ready For Deployment 2	Ready For Deployment 2	OCP is sent to 2 nd deployment team
Closed	Lead	Admin To Submitted	Submitted	OCP is sent to Manager(Lead)
		Admin To Verified	Verified	OCP is sent to UAT
		Admin To Deployment Review	Deployment Review	OCP is sent to Deployment Reviewer
Deferred	Lead	Resubmit	Submitted	OCP is sent to Manager(Lead)
		Assign	Assigned	OCP is sent to Developer
		Admin To Ready For Test	Ready For Test	OCP is sent to QA/SIT
		Close	Closed	OCP is closed

Task - non change type tasks

To track non change request tasks use the following process. The key difference between tasks and OCPs are that tasks do not result in any change while an OCP is always associated with some change. Tasks are used for queries, reporting, troubleshooting etc. Tasks can be linked to an OCP providing flexibility in assigning sub tasks (e.g. DBA requests, network support requests).

To create a new task, select Task in New dropdown and click GO.

A new task form is displayed.

Due Date: Select date task is due

Headline: One line description of task.

Field can only be updated by a lead or admin type role after initial submission.

Description: Details of task. This field cannot be updated once created - only a lead or admin can update it.

Assigned To: Select resource who is assigned to work on this task.

System and Subsystem: This helps reporting tasks by system or subsystem.

Click SAVE once all information is entered.

Once a task is submitted, updates to it can be recorded in Notes tab only. This tab displays notes in reverse chronological order. Once a note is created, it cannot be updated.

The screenshot displays the 'New Task' form in the ESC: OCFO Change Proposal (OCP) Quick Start application. The interface includes a top navigation bar with a 'Pilot' dropdown menu, a 'Go' button, and a 'New: Task' dropdown menu highlighted with a red box. Below the navigation bar is a sidebar with a tree view showing the hierarchy: Pilot > Personal Queries > Public Queries > OCP > ActiveAssignments > AssignedTask > Build > CCB > CI > NotifyOn > OCFO Subsystem > OCFO System > OCPBySubsystem. The main form area is titled 'Task: Pilot00000020 (Action: Submit)' and contains several tabs: 'Task', 'Notes', and 'History'. The 'Task' tab is active, showing fields for 'Due Date', 'Headline', 'Description', 'Assigned To', 'Reassign To', 'System', and 'Subsystem'. The 'Assigned To' field is set to 'Submitted'. The 'System' field is set to 'OCFO System' and the 'Subsystem' field is set to 'OCFO Subsystem'. The 'Description' field is a large text area. The 'Due Date' field is a date picker. The 'Headline' field is a single-line text input. The 'Assigned To' field is a dropdown menu. The 'Reassign To' field is a dropdown menu. The 'System' field is a dropdown menu. The 'Subsystem' field is a dropdown menu. The 'OCP' field is a dropdown menu. The 'State' field is a dropdown menu. The 'Find Record ID:' field is a text input with a 'Go' button. The 'View Recent...' button is also present. A red asterisk at the bottom right indicates that red text indicates required information.

Task Workflow

A task is submitted to record work that is **non-change** related. Tasks can also be linked to an OCP which allows sub tasks to be created from within an OCP. As shown in the activity diagram, the task workflow is far simpler than an OCP.

Submit: Anyone can submit a Task. A task is always associated to a system/subsystem combination and must be assigned to someone or else it defaults to subsystem manager allowing him/her to reassign it.

Active: Once the assigned person begins work, the task become active.

On Hold: Tasks can be put on hold for various reasons - by manager request, resource unavailable or awaiting external response (technical support).

Completed: After work on task is completed, the task is marked Completed.

OCP: If the outcome of the task requires a change, an OCP can be initiated from it. The OCP and Task are automatically linked.

Reassign Task: Task can be reassigned when it is Active or On Hold.

Redo Task: A completed task can be reopened and redone. It can be reassigned during a redo.

Pending Approval: A task requiring approval after work is complete and before it can be closed is sent to submitter for review

